

Demographic, Economic, and Development Trends

Suffolk County, New York

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Suffolk County was first settled in 1640 and was incorporated in 1683 as one of the ten original counties in New York State. Suffolk is a suburban county located on Long Island east of New York city and is bordered on the west by Nassau County. Suffolk County's land area totals 911 square miles, and the County is 86 miles long and 15 miles wide. With shores on both the Atlantic Ocean and the Long Island Sound, Suffolk County's shoreline totals 986 miles.

POPULATION

Total Population

Suffolk County's population continues to grow. The U. S. Census Bureau estimated that Suffolk County had a population of 1,459,000 persons in 2002, a two year 2.8% increase over the 2000 census figure of 1,419,369. The increase between 1990 and 2000 was 97,505 or 7.4%. Between the U. S. censuses of 1980 and 1990, Suffolk's population had increased more slowly, by 36,000 or 2.9%. Based on the 2002 data, among 3,141 counties in the United States, Suffolk County ranks 23rd highest in population. The County also has a larger population than 12 U.S. states.

In 1790, the first U.S. Census showed that Suffolk County had more people than Brooklyn, Queens, the Bronx and Staten Island combined. By 1915, Nassau County surpassed Suffolk County in population. But in 1986 Suffolk passed Nassau in population, becoming the most populated suburban county in the United States.

Suffolk County epitomizes the post-World War II suburb, as most of its population growth occurred in just 20 years from 1950 to 1970. During that time, Suffolk's population quadrupled, increasing by 851,000. Today its population growth is much slower. Yet despite some overall stability in the total population figures, changes have been taking place in certain segments of the population.

Population Density

Based on 2002 Long Island Power Authority (LIPA) population estimates, Suffolk County's overall 2002 population density was 1,582 persons per square mile. Yet Suffolk's ten towns vary greatly in population size and density. The five western towns, Huntington, Babylon, Smithtown, Islip, and Brookhaven, contain 89% of the County's population but just 62% of its land area. The 2002 population density in western Suffolk was 2,324 persons per square mile, while in eastern Suffolk the density was just 372 persons per square mile. Of the ten towns that comprise the County, the largest in population is Brookhaven at 459,000 and the smallest is Shelter Island with 2,300 residents in 2002.

Although Suffolk has more people than Nassau County, Suffolk is only about one-third as densely populated as Nassau. Population density in Suffolk County (1,582 persons per square mile) is lower than the density in Nassau County (4,675 persons per square mile), Westchester County (2,166), Rockland County (1,675), Queens County (20,485), and Manhattan (67,372).

Population Projections

Suffolk County's population is projected to continue to increase moderately for the next two decades. Between 2000

and 2025, the County's population is projected to increase by nearly 20%. Of Suffolk's ten towns, the Town of Riverhead is expected to increase by the largest percentage between 2000 and 2025, by more than 50%, followed in order by the Towns of Southampton, Southold, East Hampton and Brookhaven.

Saturation population is the population which can be expected if all available land were to be developed according to existing zoning. It is estimated that Suffolk County's saturation population is 1.7 million persons, and may be approached by around the year 2025. The saturation population figure represents an 17% increase over the 2002 population figure for the County.

The County's projected saturation population has declined markedly in recent decades. In 1962, the saturation population was projected to be 3.4 million people in Suffolk County. Due to zoning changes, land preservation efforts and lower average household sizes, a much lower saturation population is now expected.

AGE OF THE POPULATION

The median age of the County's population in 2000 was 36.3 years, compared to the State's median of 35.9 and the national median of 35.3. In recent decades, the median age of the population in Suffolk has been increasing. The median age of Suffolk residents was just 33.5 in 1990, 29.9 in 1980 and 26.4 in 1970.

School-age Population

Because of increasing numbers of births, the pre-school (age 0-4) population in Suffolk County grew by more than 7,000 or by 8% during the 1990s according to the 2000 U. S. census. Between the censuses of 1980 and 1990 this pre-school population increased by 6% after declining by 22% in the 1970s.

Public school enrollment in Suffolk County continues to grow, although enrollment is still far below the levels of the 1970s. The recent high level of births in Suffolk County has already led to crowding in some elementary schools. Many school districts have reconfigured their grades and now operate K-5 elementary schools and middle schools that include a sixth grade. Suffolk County's public school enrollment declined more than one-third from a peak of 331,000 in 1975 to 214,000 in 1990. These declines led to the closing of over 70 schools in Suffolk County. After bottoming out in 1990, public school enrollment in Suffolk County began to increase in 1991 and has increased every year since. Public school enrollment was 254,199 in 2001 but was still 25% lower than in the peak years of the 1970s. Enrollment is projected to continue to increase by about 2% annually through 2004, with the largest increases in the middle school grades.

The teenage population in Suffolk County declined considerably from 1980 to 1990 by 28%. It is this change that contributed to the sharp decline in the number of high school graduates during the 1980s. The number of teenagers declined again by 4% between 1990 and 2000, but the number of teenagers has started to increase, which will cause the number of high school graduates to increase for at least the next several years.

Senior Citizen Population

Persons aged 65 and over are a rapidly growing segment of Suffolk County's population. In 2000, there were 167,000 persons aged 65 and over in Suffolk, comprising 11.8% of the population. In 1990, seniors aged 65 and over represented 10.7% of the population in 1990, up from 9.0% in 1980 and 7.6% in 1970. The total number of seniors rose by 18% between 1990 and 2000 after an increase of 22% in the 1980s and 35% in the 1970s.

The 2000 census revealed that 35,000 or 22% of the County's senior citizens live alone, and that 25% of Suffolk County households contain a senior citizen. In the five eastern Suffolk towns, 18% of the population is aged 65 or over and 33% of households contain a senior citizen.

Senior citizens migrate to Suffolk County from other nearby counties for a variety of reasons. Sometimes a senior

citizen's children or grandchildren already live in Suffolk. Housing in Suffolk is less expensive than in Nassau, and the population density is lower and therefore more attractive as a retirement destination. Also, Suffolk contains more units of market rate senior citizen housing than Nassau County. Suffolk's senior condominiums draw residents from Suffolk and Nassau Counties and beyond. About one-third of residents in newly constructed senior citizen condominiums in Suffolk are previous Nassau County residents, and 10% come from New York City.

HOUSEHOLD SIZE

The average household size in Suffolk continues to decline. Average household size in Suffolk peaked at 3.7 in 1967. Household sizes began to decline in the 1970s and averaged 3.04 by 1990. In 2000 the average Suffolk County household size was 2.96 people, and remained at 2.96 in 2002. No further significant declines are expected.

New housing developments tend to contain younger families and larger household sizes. As an area's residents and housing mature, household sizes tend to decline, causing the total population to decline. This is especially true as development approaches saturation conditions and little new housing is built. Nassau County had a net loss of over 100,000 people between 1970 and 1980 mostly due to a declining average household size. Suffolk County similarly had a major decline in household size over that time period but total population did not decline because of the addition of 90,000 new households.

RACE AND ETHNICITY

Suffolk County's population is mostly White and in 2000, non-Hispanic Whites made up 79% of the population. Hispanics are now the largest minority group in Suffolk and numbered 149,000 or 11% of the population in 2000. Blacks numbered 98,000 or 7% of the total and there were 35,000 Asians comprising 2% of the population. The American Indian population in Suffolk County was 3,800 in 2000, less than 1% of the population. The 1990 census showed that half of Suffolk's adult Asian population were college graduates, a higher percentage than for the population as a whole. This highly educated group is expected to continue to increase in number in Suffolk County.

Suffolk County continues to become more racially diverse. Between 1980 and 1990, the non-Hispanic White population declined by 1% while the Black population rose 16%, the Hispanic total increased by 50% and the Asian total grew by 124%. Between 1990 and 2000, the non-Hispanic White population declined by 1% while the Black population rose 19%, the Hispanic population increased by 70%, and the Asian population grew by 52%. By the year 2020 Long Island is projected to be 59% White, 17% Hispanic, 15% Asian, and 9% Black.

Three ancestry groups dominate Long Island's population. Suffolk County has more persons of Italian ancestry than any county in the United States. Italians make up 29% of the County's population, Irish persons comprise 23% and Germans make up 17% of the population. There are more people of Irish and German descent on Long Island than in all of New York City.

Of Suffolk County's Hispanic population, one-third were Puerto Rican, based on 2000 census data. The next largest Hispanic groups were (in order) Salvadoran, Dominican, Colombian, Mexican, and Ecuadorian. Jamaican and Haitian are not considered Hispanic origin groups but could also rank highly. Half of Suffolk County residents who spoke Spanish also speak English very well, based on 2000 census data.

INCOME

Personal and Per Capita Income

Total personal income of Suffolk residents was \$52.1 billion in 2001, ranking 6th of all counties in New York State. The County's 2001 per capita personal income was \$36,109, ranking 7th in New York State. Suffolk's per capita

income was 19% higher than the national average of \$30,413. Of 3,110 counties in the United States, Suffolk's per capita income ranked 106th highest in 2001.

Household Income

According to the 2000 U. S. census, Suffolk County's median household income was \$65,288 in 1999. In 2002 dollars, the County's median household income is estimated to be \$70,800. Suffolk County's median household income ranked 34th of all counties in the U. S. *Sales and Marketing Management* has consistently ranked Long Island (Nassau-Suffolk) as having the highest income of the largest 20 metropolitan areas in the country. According to the *Sales and Marketing Management* 2001 "Survey of Buying Power," the median household effective buying income in the Nassau-Suffolk area was \$60,941, 56% above the national average of \$39,129.

Poverty

Suffolk County's poverty rate is among the lowest in New York State, yet in 1999, 86,000 persons or 6.3% of the population were living in poverty, according to the U. S. Census Bureau. This figure is based on a national poverty threshold which was \$17,463 for a family of four in 2000. In a relatively high cost area such as Suffolk County, poverty can be easily understated because the thresholds are based on a national standard. Nonetheless, in 1999, 25,705 or 7.1% of persons under age 18 in Suffolk County lived in poverty as defined by the Census Bureau.

HOUSING

Long Island has a very high percentage of owner-occupied housing units. In 2000, 80% of Long Island's occupied housing units were occupied by their owners, far above the nationwide figure of 66%. Long Island also has one of the lowest housing vacancy rates in the country. The homeowner vacancy rate in Nassau-Suffolk was 0.3% in 2002, indicating a tight market, but the vacancy rate in rented housing units increased to 6.3%, indicating some slight softening in the rental market.

The Suffolk County housing market remains strong and high-priced. Suffolk County housing prices, after tripling during the 1980s, declined by about 12% between 1989 and 1995 because of a weak economy and the excessive housing price rises in the 1980s. During the 1990s, housing in Suffolk became more affordable than it was in the 1980s. Housing prices began to increase more rapidly in 1999, rising by 9% in 1999, by 13% in 2000, 16% in 2001 and 24% in 2002. Price increases are continuing. In December 2003, the median used-home price in western Suffolk was \$325,000, up 16% over the 2002 figure and 71% above the year 2000 figure. Overall, the median used-home price in Nassau-Suffolk was \$374,400 in the 3rd quarter of 2003, a 15% increase in one year. In 2002, *Worth* magazine ranked "America's 250 Richest Towns" based on home selling prices in 2000 and 2001, and 34 Long Island communities were on the list, mostly located on the north shore of Nassau and western Suffolk and in the Hamptons.

Housing rents have increased dramatically as well. The U.S. Department of Housing and Urban Development estimates that in 2003 the fair market rent for a one-bedroom apartment in Nassau-Suffolk was \$1,085 per month. (This figure represents the 40th percentile, that is, 40% of units are less expensive than this figure and 60% are more expensive). An analysis of apartments for rent in *Newsday* showed that in early 2004 in Suffolk County, the average rent for a one-bedroom apartment was \$1,103, an increase of 8% over the 2002 figure and 41% higher than in 1999. In a ranking of median gross rent according to the 2000 U. S. census, Suffolk County ranked 11th highest among all counties in the nation.

After relatively little rental apartment construction in the 1980s, construction of apartment complexes for seniors and non-seniors have increased substantially in recent years. In the 1980s, nearly 1,700 units of market rate senior apartments were constructed in Suffolk County, and 2,800 units were constructed in the 1990s. Already since 2000, more than 2,600 senior citizen apartment units have been built. Non-senior apartment construction has increased just as dramatically. In the 1980s in Suffolk, 885 market rate apartment units were built, followed by 2,500 units in

the 1990s, and 2,200 units already since 2000. Many of these new complexes charge rents in excess of \$1,500 for a one-bedroom apartment.

Housing sales and construction continue at a brisk pace. In 2002, 10,527 homes were sold through the Multiple Listing Service, 6% fewer than the record high year of 1999 but slightly ahead of sales in 2001 and 20% higher than the number of homes sold in 1995. The value of new residential construction in Suffolk hit an all-time high of \$788 million in 2002 but dropped back to \$745 million in 2003, still 25% higher than the 2000 figure and more than double the level in each of the years 1989 through 1993.

Building permits issued for housing in Suffolk County declined significantly in the early 1990s but then rebounded. In 2003, 3,208 new housing units were authorized by building permit in Suffolk County, a 27% decline from the level of 2002. Several building moratoriums in central and eastern Suffolk have affected new construction. Each year for decades Brookhaven Town has led the ten towns in the highest number of new housing unit permits issued. In 2003, this still held true but the number of new housing units authorized in Brookhaven was less than 1,000 for the first time since the recession year of 1982. The amount of vacant land available for future development is becoming more limited.

ECONOMY

Employment

Employment on Long Island was 1,236,800 in December 2003, a slight increase of 1,900 or 0.2% from the previous year. Suffolk County continues to experience relatively steady employment conditions. As of December 2003, 740,200 Suffolk residents were employed, up 0.8% from a year earlier. Between the second quarter of 2002 and the second quarter of 2003, Suffolk County gained 5,200 jobs. Retail trade experienced the largest over-the-year increase (2,200 or 3.1%), followed by educational services (primarily school districts, an increase of 2,100 or 3.1%) and health care (2,000 or 2.9%). The largest declines in jobs occurred in information (-1,200 or -7.0%) and manufacturing (-1,100 or -2.0%). In particular, computer and electronic product manufacturing lost 1,300 jobs in the period.

During the period from 1980 to 1988, employment on Long Island grew by 239,000 or 24%. But the combination of a recession and defense cutbacks caused the loss of 88,500 jobs (nearly 8% of the job total) on Long Island in the period from 1989 to 1992. Between 1993 and 2000, Long Island gained 168,900 jobs, including 41,800 jobs added in 1999 and 27,800 added in 2000. In 2001, employment growth slowed considerably and in 2002, 6,600 jobs were lost.

After significant manufacturing job losses between 1986 and 1994, employment in Nassau-Suffolk's manufacturing sector stabilized, but since 2000 moderate job losses in this category have resumed. Employment in durable goods manufacturing declined from 91,200 in 1990 to 65,200 in 1994 and was 51,500 in December 2003. Transportation equipment manufacturing jobs, almost exclusively defense related, declined from 15,800 in 1990 to 6,400 in 1998, and was 4,700 in December 2003. However, employment in the manufacture of chemicals has increased by 30% in the past ten years, from 7,900 jobs in 1993 to 10,300 jobs in December 2003.

The employment base on Long Island has become more diversified in the past ten years. The loss of defense jobs in the 1980s and 1990s hurt the Long Island economy but allowed the economy to become less dependent on one industry. The region slowly emerged from the painful defense industry downsizing of the late 1980s with several small engines of economic growth in an array of industries. The biotechnology, electronics, instruments and wireless technologies, and software industries are growing and are helping to further diversify the local economy. Long Island's bioscience research community is expected to continue to expand, with the major players being Cold Spring Harbor Laboratory, SUNY Stony Brook, Brookhaven National Lab, and the North Shore Health System.

Unemployment and Inflation

Suffolk County continues to experience low unemployment. The unemployment rate in Suffolk County has been consistently lower than the national rate and remains relatively low. In December of 2003 there were 33,900 unemployed Suffolk residents, roughly the same as the number unemployed in December 2002 but 72% more than in the strong economy of December 2000. Suffolk's 4.4% unemployment rate is the same as it was a year ago and is still considered close to a "full employment" rate (defined as below 4%) and remains lower than the rate in New York State (6.1%) and the United States (5.4%) but higher than in Nassau County (3.8%).

Inflation remains very moderate in the region. The consumer price index for the New York metropolitan area increased by less than 3% in each of years 1994 through 1999. Inflation for 2001 and 2002 was 2.5%, still among the lowest inflation rates since the mid-1960s, and was 3.1% for 2003.

Major Employers

In 2003, 35 private employers each had more than 2,000 workers on Long Island. These employers cover a wide range of industries, including medical care, telecommunications, banking, educational institutions, and department stores. The North Shore Health System, a network of 11 hospitals and other health care centers, is Nassau-Suffolk's largest employer, has nearly 27,000 employees in 2003. The Diocese of Rockville Centre employs 17,500 in Nassau-Suffolk. The Long Island Railroad, Waldbaums supermarket, the Winthrop Health System (hospitals), and Cablevision (telecommunications) each employ more than 6,000 on Long Island. The next largest employers are Home Depot, J.P. Morgan Chase (financial services), Verizon (telecommunications), Stop & Shop supermarkets, Federated Department Stores, King Kullen supermarkets, and KeySpan (electric and gas utility) each of which employ between 4,500 and 6,000 in Nassau-Suffolk. Other companies employing at least 2,500 in Nassau-Suffolk include United Parcel Service, Brookhaven National Laboratory, *Newsday*, and Computer Associates, one of the largest software development companies in the U.S. and headquartered in Islandia in Suffolk County.

Grumman Corporation, a defense contractor, had employed 25,000 persons on Long Island in 1986 but by 2003 Northrop-Grumman employed just 2,000 persons on Long Island. (Northrop acquired Grumman in 1994.) In 2003 a \$1.9 billion contract was awarded to Northrop-Grumman to upgrade the Navy's E-2C Hawkeye plane. This is the largest military contract to come to Long Island since the Cold War ended in the early 1990s. By the end of 2004 this new contract will generate 900 new jobs, primarily electrical and software engineers.

Former Grumman facilities in Suffolk County have been converted to other uses. Grumman's 175,000 square foot building in Holtsville in Suffolk County was purchased by Symbol Technologies, an industry leader in bar code scanning technology. The building was renovated and expanded to 300,000 square feet and is now the company's headquarters. A former 260,000 square foot Grumman building in Melville was renovated in 1995 and is now a major office for Olympus. Grumman's 385,000 square foot facility in Great River is being reused as the Long Island Technology Center, a technology firm "incubator." Grumman's 2,900 acre Calverton facility includes one million square feet of buildings occupied by various light manufacturing businesses but the bulk of the property remains an opportunity for re-use and will likely be redeveloped with mixed industrial uses served by a restored freight rail line and commercial recreation uses including a possible theme park.

The number of businesses located in Suffolk County continues to rise. Of all counties in the U. S., Suffolk County ranked 13th in the number of business establishments in 2001. There were more than 43,000 business establishments with payroll in 2001 in Suffolk, an all-time high and a 5% increase since 1998. The largest number of businesses are in the retail trade category; followed by construction and "professional, scientific & technical services." Sixty-two percent of Suffolk's businesses employ fewer than 5 persons, and a 78% of businesses in Suffolk employ fewer than 10 persons.

Office and Industrial Markets

Suffolk County now contains more than 22 million square feet of private office buildings. The eight million square feet of office space built during the 1980s was eventually absorbed as there was not much new office building construction in Suffolk in the early 1990s. But since 1998, more than 4 million square feet of new office space has

come on the market. Some of this space has been created by the conversion of industrial buildings to higher office uses. More than three million additional square feet of new office space has been proposed in Suffolk County.

Suffolk County's office market has remained relatively stable in the past year. The office vacancy rate in Suffolk County for the third quarter of 2003 was 13.3%, an improvement from 14.5% in 2002. The 2003 rate is well below the vacancy rates of 1989 to 1993 which ranged from 20% to 24%. Average office rental rates have declined from more than \$24 per square foot in 2001 to \$21.89 in the third quarter of 2003.

Suffolk's industrial market has improved from the levels of the early 1990s when vacant industrial space was at record high levels. Much of the previously vacant space and new space has been occupied by expanding local businesses. According to CB Richard Ellis, Long Island's industrial vacancy rate was 6.3% in the third quarter of 2003, 2nd lowest of the 46 largest markets in the nation. Some industrial buildings in Suffolk County have been converted to retail, office, and mini-storage facilities, contributing to the improving industrial vacancy rate. According to Grubb & Ellis, the average asking rental rate on Long Island for warehouse-distribution space was \$6.00 in the second quarter of 2003, eighth highest in the nation.

After a period of little construction in the 1990s, new industrial construction has resumed. Suffolk County's 300 acre Heartland Business Center industrial park in Brentwood opened in 1990 and is already home to 3.5 million square feet of industrial space and 3,000 workers. An adjacent 87 acre parcel has recently been opened for development and could add 1.3 million square feet of space and 1,000 jobs to the industrial park. The area around Long Island MacArthur Airport also continues to receive new office and light industrial construction, recently adding more than one million square feet. The Reckson Business Center in Bohemia recently added 2 buildings, a 106,000 square foot building and a 130,000 square foot building that was occupied in 2000 by Tellabs, a manufacturer of telecommunications equipment.

Suffolk County contains fifteen communities which each contained more than 10,000 jobs in 2000 according to the U.S. Census Bureau. Employment in these areas is high because of concentrations of office, industrial, or institutional development. The largest employment centers in Suffolk are Melville, Hauppauge, and Farmingdale, which each contain more than 30,000 jobs.

Hotels and Motels

Suffolk County's extensive industrial, office, and tourist markets support a large number of hotels, motels, and bed & breakfast inns. Suffolk has 317 hotels and motels, which together contain 11,465 rooms, and 27% of those hotel/motel rooms are seasonal in nature. These seasonal lodging properties are open only during the warmer months and are located in eastern Suffolk County. In the past few years, numerous small bed and breakfast inns have opened in central and eastern Suffolk County.

The lodging industry continues to show signs of softening in Suffolk County. Occupancy rates in western Suffolk's hotels and motels steadily rose between 1991 when occupancy was 57%, to 80% in 1999, but then began to decline as new hotels were constructed and the local economy softened. For 2003, occupancy levels in western Suffolk were 71%. Average daily hotel room rates increased by double digit percentages in Suffolk County in the late 1990s until 2000 but have since declined slightly.

After tremendous hotel construction in Suffolk County in the 1980s, several local hotels went into bankruptcy and some closed permanently. No major new hotels opened in Suffolk between 1991 and 1998. But as a result of higher occupancy and room rates in the late 1990s, several large new hotels began to open in Suffolk County starting in 2000. An Extended Stay America hotel opened in 2000 in Melville and a Holiday Inn Express opened in Hauppauge in 2001. In 2002, three major hotels opened in Suffolk: a Hampton Inn in Medford, a Courtyard by Marriott in Lake Ronkonkoma (both near the L. I. E.) and a Marriott Residence Inn in Hauppauge. In 2003 a Hilton Garden Inn opened in Ronkonkoma and the 50 room Inn at East Wind opened in Wading River. A 109 room Wingate Inn in Brentwood and a Marriott Residence Inn in Holtsville are currently under construction. In the past five years, more than 20 new small bed & breakfast inns have opened in eastern Suffolk County. Numerous large

new hotels have been proposed to be built in Suffolk County but have not yet started construction. Since 2000, 18 additional new hotels have been proposed for Suffolk County, each with more than 100 rooms and many with suites.

Retail Market

Retailers are attracted to Suffolk County because of its relatively high income, high retail sales levels, and population density. According to *Sales and Marketing Management's* 2001 Survey of Buying Power, Nassau-Suffolk had \$42 billion in retail sales or \$46,368 in retail sales per household, which ranked third among the nation's 20 largest metropolitan areas and 35% above the national average. Suffolk's sales tax revenues increased by 3.9% in 2001 over the 2000 figure, after a 5.2% increase the previous year.

Suffolk's shopping centers total 36.9 million square feet (29% of the space built since 1990) and the County's downtown centers have 8 million square feet of retail space. After relatively high vacancy rates in shopping centers and business districts in the mid-1990s, most centers are experiencing fewer vacant stores in recent years. Vacancy rates in 2000 were 8.1% in downtown areas, and 12.0% in shopping centers, still historically high but much improved since the last Suffolk County Planning Department analysis in 1996. Proposals exist for 5,000,000 square feet of new retail in stores or centers 100,000 square feet or larger in Suffolk County.

A retail building boom has taken place in Suffolk County since 1990, with more than ten million square feet of retail space added. More than 20 "big box" stores over 100,000 square feet (such as K Mart and Costco) have been constructed in Suffolk since 1993. In 1999 the discount department store chain Target entered the Suffolk County market and has opened five new stores in Suffolk County and is building stores in Riverhead and East Farmingdale. Additional stores are proposed for Holbrook and Medford. In the past three years, B J's wholesale club built new stores in South Setauket and East Farmingdale and now has four Suffolk locations. Costco hopes to open a fifth Suffolk County store in Riverhead. Home Depot continues to open new stores in the county and now has 13 stores in Suffolk, with three additional stores proposed. Meanwhile, Lowe's (a Home Depot competitor) opened a new store in Medford in 2002 and at least three more stores are proposed (Rocky Point, West Bay Shore, and Riverhead). Kohl's department store chain entered the Suffolk County market in 1999 and has opened seven large stores, most of which were previously occupied by Caldor. Best Buy, a national retailer of home electronics and appliances, opened its first Suffolk County stores in 2000 and now has six stores in Suffolk County. Wal-Mart entered the Suffolk County market in the late 1990s and occupied stores in previously constructed retail space. Wal-Mart now has five stores in the county, with plans to build new stores in East Farmingdale and Commack. Stew Leonard's, a large fresh food supermarket, has plans to build a new 122,000 square foot store by Republic Airport in East Farmingdale.

Suffolk County's three regional malls have all undergone significant expansions in the last several years. In Bay Shore, the South Shore Mall in 1997 was renovated and expanded by 400,000 square feet, adding a Lord and Taylor department store. In 1999, the Walt Whitman Mall in South Huntington completed a major renovation and expansion. Two new department stores were added to the mall, Bloomingdale's and Saks Fifth Avenue. A proposed 850,000 square foot shopping center in Yaphank in east central Suffolk County has yet to begin construction. In 1997 the Tanger Outlet Center in Riverhead expanded to become the nation's fifth largest manufacturers outlet center at 777,000 square feet. Tanger has proposed building another outlet center (790,000 square feet) in Deer Park.

Tourism and Recreation

Tourism is an important part of Suffolk County's economy, especially in the more rural eastern portion of the County. Its 986 miles of shoreline and over 70,000 acres of parkland make Suffolk County a very attractive place to live or visit. Suffolk County has 38,000 seasonal homes, more seasonal homes than all but a handful of counties in the country.

Golf courses abound on Long Island. There are 135 public and private courses on Long Island, 81 of which are

located in Suffolk County. In the past ten years at least a dozen new courses have opened and several more are proposed. The U.S. Open golf tournament took place at Bethpage State Park in 2002 and the U.S. Open will return to Long Island to Shinnecock Hills Golf Club in 2004.

In 1996, an indoor sports complex known as Sports Plus was completed in Suffolk County. The 169,000 square foot \$32 million facility lies near the Smithaven Mall in Lake Grove. Another amusement center, Bullwinkle's, opened in 1999 along the Long Island Expressway in Medford. In 1999, a retail/entertainment center opened at the site of the former Fairchild Republic manufacturing site in East Farmingdale on the Nassau-Suffolk border. This complex includes the Farmingdale 14 screen multiplex theater, the 400,000 square foot Airport Plaza shopping center including Home Depot, Border's Books and other retailers, and Jillian's, a 60,000 square foot indoor recreation and entertainment complex. A new multiplex theater recently opened at exit 62 of the L.I.E. in Holtsville.

A \$16 million 6,000-seat baseball stadium opened in 2000 near the New York Institute of Technology and the new federal and county court complexes in Central Islip. The Long Island Ducks baseball team, part of an independent league, plays at the stadium. Suffolk County entered into contract with a private contractor who operates and manages the County-owned facility. In 2002 SUNY Stony Brook completed its new \$25 million stadium, the largest outdoor sports arena in Suffolk County, an 8,254 seat venue that will be used for concerts and other events.

In 2000 a new \$20 million 42,000 square foot aquarium opened in Suffolk County, the Atlantis Marine World aquarium in downtown Riverhead. The aquarium attracted 500,000 visitors in 2001. A large expansion of the aquarium is planned, including a hotel and conference center. Another aquarium, the \$62 million 85,000 square foot Long Island Aquarium and IMAX theater, has been proposed in Brentwood and could open by 2005.

A 200,000 square foot astronomy museum known as Museum of the Universe has been proposed for Long Island but has not yet found a site. The museum would include a 3D IMAX theater, a planetarium, and a separate children's museum on astronomy.

Farming

In 2002, the annual market value of crops produced in Suffolk County was \$175 million. Suffolk County continues to lead all New York State counties in the value of all agricultural products sold. Suffolk is first in New York State in the production value of potatoes, cauliflower, broccoli, and nursery and greenhouse products. Suffolk now accounts for 43% of all the market value of nursery and greenhouse products produced in New York State. Once famous for oysters, potatoes, and ducks, Suffolk County is now well-known for its quality wines. The harvesting of grapes for wine production is a relatively new agricultural industry that emerged in Suffolk County around 20 years ago.

Farming and tourism in Suffolk County are interrelated. Farmland provides an open and rural character that offers a change from the congested areas in and around New York City. Eastern Suffolk's numerous farm stands offer fresh local produce to local residents and visitors. Several downtown areas in western Suffolk have green market programs where local produce is sold.

In 2002, Suffolk County's farmland totaled 32,500 acres, the vast majority of it in eastern Suffolk. However, farmland acreage is decreasing by about 1,400 acres per year. Suffolk County's "purchase of development rights" program to protect farmland began in 1974 and was the first such program in the United States. To date, the program has preserved 7,600 acres of farmland.

Other Major Development Activity

The area which formerly contained the Central Islip Psychiatric Center continues to undergo major redevelopment. Suffolk's \$128 million, 500,000 square foot Cohalan County Court Complex was completed in 1996, and the \$212 million, 822,000 square foot federal courthouse opened in 2000. The federal complex is one of the largest federal courthouses in the country. Next to the courthouses, Touro Law School is building a new \$30 million law school,

and a \$16 million ballpark where the Long Island Ducks play opened in 2000. Courthouse Corporate Center, a 175,000 square foot office building opened in 2000 in a building once used by the Psychiatric Center, a large shopping center with a supermarket opened across Carleton Avenue in 2001, and a 153-unit senior apartment complex opened in 2003. Restaurants and a Hampton Inn hotel are also proposed for the site.

In 2002, a surplus 460 acres at the Pilgrim State Psychiatric Center in Brentwood were sold to a developer and a \$4 billion mixed-use community has been proposed for the site, containing 1,000,000 square feet of upscale lifestyle retail, 9,000 units of mid-rise rental housing, 3 million square feet of offices, a hotel, a cultural center and the Long Island Aquarium. The development will be built on a pedestrian-friendly grid street system and will contain public and semi-private recreation and open space. The first phase will take five years to complete.

The 408 acre Long Island Developmental Center in Melville, another state surplus property, was sold in 1998. The site is currently being developed for 1,375 mostly senior housing units and an 18 hole golf course. New York State is also offering a portion of the 370 acres of the former Kings Park Psychiatric Center for sale for development, after 150 acres there were converted to a state park in 2000.

In 1999, a retail/entertainment center opened at the site of the former Fairchild Republic manufacturing site in East Farmingdale on the Nassau-Suffolk border. Stew Leonard's, a fresh foods supermarket, plans to build a 125,000 square foot store across the street on the west side of Route 110.

TRANSPORTATION

Traffic congestion is a problem in Suffolk County that has increasingly worsened during the last 25 years. While the population in Suffolk has increased only modestly in recent decades, the number of registered vehicles has increased faster, to 1.18 million, and the number of licensed drivers increased to 1.05 million in 2001. Meanwhile, for about 20 years after construction of the Long Island Expressway was completed in 1972, New York State did very little to increase traffic capacity on Long Island. In the 1990s, high occupancy vehicle lanes were added to the Long Island Expressway to help manage congestion.

Because of the increase in local job opportunities in recent decades, 73% of Suffolk's workers now work in Suffolk County and 87% work in Nassau-Suffolk. Most Suffolk County work trips are fairly local, lasting a median of 32 minutes. But because the population and the major employment centers in Suffolk are dispersed, it is difficult to effectively serve the population with mass transit. During the 1980s, the number of Suffolk workers who drove alone to work increased by 43% while the number of people who car pooled declined by 35%. In the 1990s the number who drove alone increased further by 3% and the number who car pooled declined further by 3%. Use of public transit to travel to work increased by 18% in the 1980s (mostly due to Suffolk's new bus system) and by 2% in the 1990s.

The Long Island Railroad put new dual-powered locomotives and new train cars into service in 1998. These trains can travel directly to Manhattan without forcing riders on the Port Jefferson and Montauk branches to change trains en route to Manhattan.

In 1999, Suffolk County's Long Island MacArthur Airport finished a \$13 million improvement project. Improvements included a new baggage claim area, new ticketing counters and 1,000 new parking spaces. In 1999, Southwest Airlines began service at MacArthur Airport, which has caused a significant increase in passenger traffic. Passenger traffic doubled between 1998 and 1999 at MacArthur to 2.27 million passengers. Passenger traffic declined somewhat to 1.98 million in 2002, but remains twice the level of five years ago. Southwest recently added a new 154,000 square foot concourse and expanding Southwest's capacity from six gates to 10 gates.

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